

Side panel — forms for plans, items and cohorts

The panel that slides in from the right: the three-step new plan setup, the item form, and choosing a cohort to attach or copy to.

1 What this page is for

WHAT THE SIDE PANEL IS

Whenever you create or change something bigger than a name, a white panel slides in from the right and the rest of the screen dims. It is used for:

- **New lesson plan** — three steps: Program, Cohort, Start from.
- **New item** and **Edit item** — one material, assignment, quiz or question, with its links.
- **Attach this plan to a cohort** and **Copy this plan to another cohort**.

CLOSING IT

Press **Cancel**, or click anywhere on the dimmed part of the screen. Anything not yet saved is dropped. Nothing is saved until you press the purple button at the bottom (**Save**, **Create plan**, **Attach** or **Copy and attach**).

While the panel is open the ? **Help** button moves to the bottom-left so it never covers **Save**. Each panel heading has its own ?.

2 Step 1 — Program

Choose which **program** this plan is for. The program decides which cohorts you can pick in step 2 and which existing plans you can copy in step 3.

The three step names across the top of the panel show where you are: the current step is highlighted and finished steps are marked done.

Press **Next** →. Nothing is saved yet.

3 Step 2 — Cohort

Choose the **cohort** (class dates) whose students should see the plan. The menu lists every cohort of the chosen program from Transition Enroll, as *start* → *end*. Cohorts still taking registrations are marked • **open**.

Not sure yet? Choose **Not yet — attach later**. The plan will be created but students will not see it until you press **Attach to cohort** on the plan.

Step 3 fills in the plan name for you: the program, plus the cohort's start date if you chose one.

4 Step 3 — Start from

CHOICE	WHAT YOU GET
Empty plan	A plan with no topics or items. Build it from scratch.
Copy an existing plan	Every topic, item and attachment from the plan you pick, in the same order. Items keep their Draft/Posted setting; not-before dates are cleared. The original plan is not touched.

Plan to copy lists only plans for the same program, each with its cohort start date and item count, so you can pick the most recent full one.

Plan name is what staff see in the list. Students see it as the heading of their lessons box, so keep it clear, for example *Certified Nursing Assistant — Oct 6, 2026*.

Press **Create plan**. Copying a large plan takes a few seconds.

5 New item

Adds one thing for students. The fields:

FIELD	WHAT TO PUT
Title	Short and clear, for example <i>Chapter 1 questions</i> . If left empty it is saved as <i>(untitled)</i> .
Type	material (read or watch), assignment (hand something in), quiz or question . It sets the letter students see.
Topic	Which day or week it belongs to, or <i>No topic</i> .
Instructions / description	What the student should do, and by when. Students see all of it.
Students can see it	Yes (posted) or No (draft) .
Not before	Optional date. A posted item stays hidden until this day starts (midnight, local time). Until then it shows as Scheduled in the plan.

+ **Add item** at the top of the plan starts a new item as a **draft** in the first topic. + **item** on a topic bar starts it as **posted** in that topic. Check **Students can see it** before you press Save.

Attachments can be added once the item is saved — reopen it by clicking its title.

6 Edit item

The same fields as a new item, filled in with what is saved, plus **Attachments** and **Delete item**.

ATTACHMENTS

- Each saved link shows its name and kind in brackets, with a **remove** button.
- To add one: type a name in **Attachment name** (optional — the link itself is used if blank), paste the address in **Paste a link**, press + **Add link**.
- The kind is worked out from the address: *youtube* for YouTube, *forms* for Google Forms, *file* for Google Drive and Docs, *link* for anything else.
- Adding and removing links saves **immediately**. You do not need to press Save for them.

SAVING AND DELETING

Save stores changes to the other fields. **Delete item** removes the item after you confirm. **Cancel** closes without saving the other fields.

7 Attach this plan to a cohort

Choose the cohort whose students should see this plan's posted items. The menu shows *program · start → end*, with **open** for cohorts still taking registrations. If the plan has a program, only that program's cohorts are listed.

Press **Attach**. The line under the plan title updates and *Attached* appears. Attaching also sets the plan's program to the cohort's program.

A plan belongs to one cohort. Attaching it to a new cohort moves it: the old cohort's students stop seeing it. To serve two cohorts, use **Copy to another cohort** instead.

8 Copy this plan to another cohort

Makes a **full copy** — topics, items and attachments — and attaches the copy to the cohort you pick. The plan you are looking at stays exactly as it is, attached to its own cohort.

- The copy is named *program — start date* of the new cohort. Rename it by clicking its title.
- Items keep their Draft/Posted setting. Not-before dates are cleared, so set new ones for the new dates.
- When the copy is ready it opens, and *Copied* appears.

Press **Copy and attach**. The button says *Copying...* while it works; large plans take a few seconds.

Create a plan with the three steps

1. On **Lesson plans** press **+ New plan**.
2. **1. Program** — choose the program. Press **Next** →. (It will not move on until a program is chosen.)
3. **2. Cohort** — choose the cohort, or *Not yet — attach later*. Press **Next** →. Use ← **Back** to change the program.
4. **3. Start from** — choose **Empty plan** or **Copy an existing plan**. If copying, choose the plan to copy.
5. Check **Plan name** and press **Create plan**. The button says *Creating...* while the copy is made, then the new plan opens.

Add an item with a link

1. Press **+ item** on a topic, or **+ Add item**.
2. Fill in **Title**, **Type**, **Topic** and **Instructions / description**.
3. Set **Students can see it** and, if needed, **Not before**.
4. Press **Save**. The panel closes and the item appears in the plan.
5. Click the new item's title to reopen it.
6. Under **Attachments**, type a name, paste the link and press **+ Add link**. The link appears in the list right away.
7. Close the panel with **Cancel** (the link is already saved) or press **Save** if you also changed other fields.

Remove a link from an item

1. Click the item's title to open it.
2. Under **Attachments**, press **remove** next to the link. It is removed straight away.

Delete an item

1. Click the item's title to open it.
2. Press **Delete item** at the bottom and confirm.

10 If something looks wrong

I see "Save the item first, then add attachments."

Links can only be added to an item that already exists. Press

Save

, then click the item's title to reopen it and add the link.

I see "Pick a program first." or "Give the plan a name."

A required box is empty. Fill it in and press the button again.

The Cohort menu is empty or says there are no cohorts for this program.

That program has no cohorts in Transition Enroll yet. Choose *Not yet — attach later*, create the plan, and attach it once the cohort exists.

I pressed + Add link and nothing happened.

The link box is empty. Paste the link into

Paste a link

first.

11 Flip-book edition

The same subject as a page-turning flip-book. Opens in a new tab.

FLIP-BOOK

FLIP-BOOK

Module 4: Inside a plan, topics and items (slide deck)

Page-turning edition. Opens in a new tab.

Module 5: Attachments, scheduling and release dates (slide deck)

Page-turning edition. Opens in a new tab.